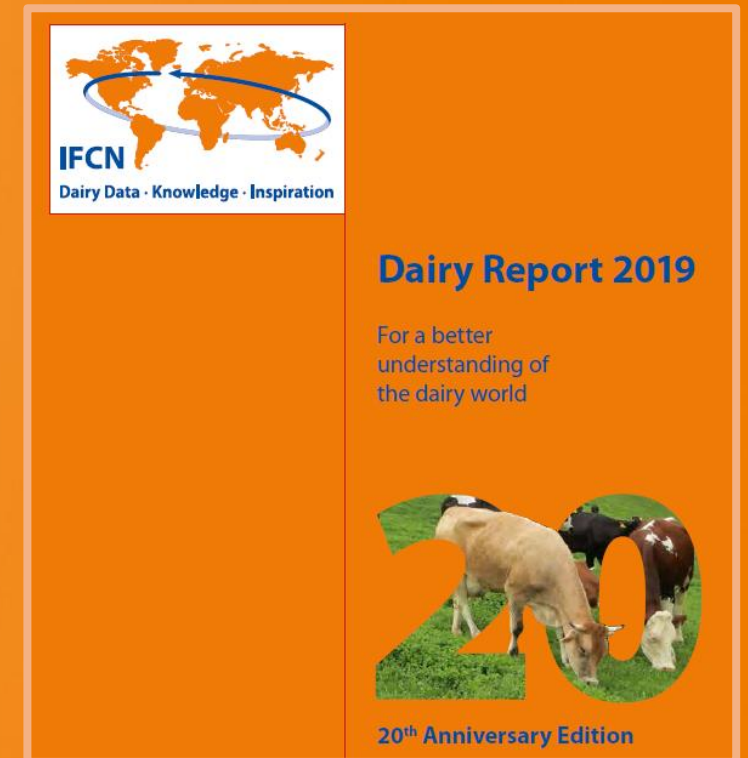


# IFCN World Dairy Map 2020

A summary of the IFCN Dairy Report 2019 for the global holistic picture



IFCN Dairy Research Network, Germany; [info@ifcndairy.org](mailto:info@ifcndairy.org)



**Complexity and speed  
of change  
in dairy are rising**

# The IFCN Dairy Network

**Mission:** We help people in the dairy world to make better decisions.

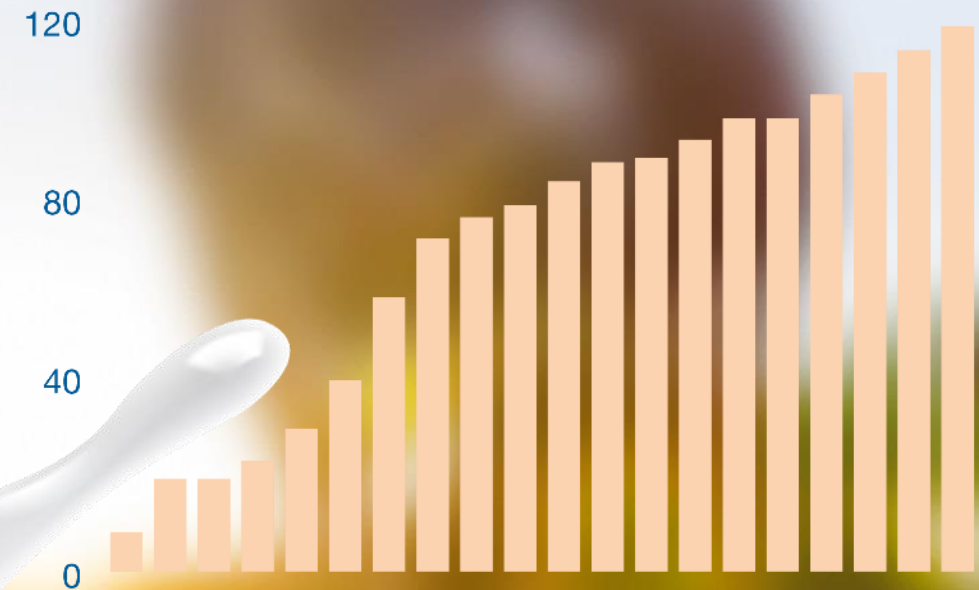
## The IFCN Approach: 3 Knowledge Pillars



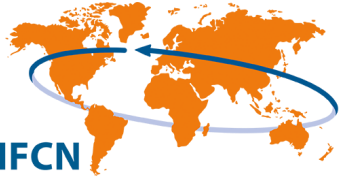
# IFCN is unique

- Knowledge creation by connecting data and people
- Researchers from 100+ countries and 20+ professionals at IFCN
- 140 companies from the whole dairy supply chain are partners already

## Number of countries in the research network



**Status 2020: 120 countries covering 98% of world milk supply**



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# IFCN is a building block in the market intelligence of 140 companies

## Milk Processing



## Feed And Feed Additives



## Milking And Barn Equipment



## Farm Machinery



## Health And Hygiene



## Generics For Animal & Plants



## Milk Testing, Measure, Transport



## Milk Processing And Packaging Technologies



## Finance Institutions



## Agriculture Technology Companies



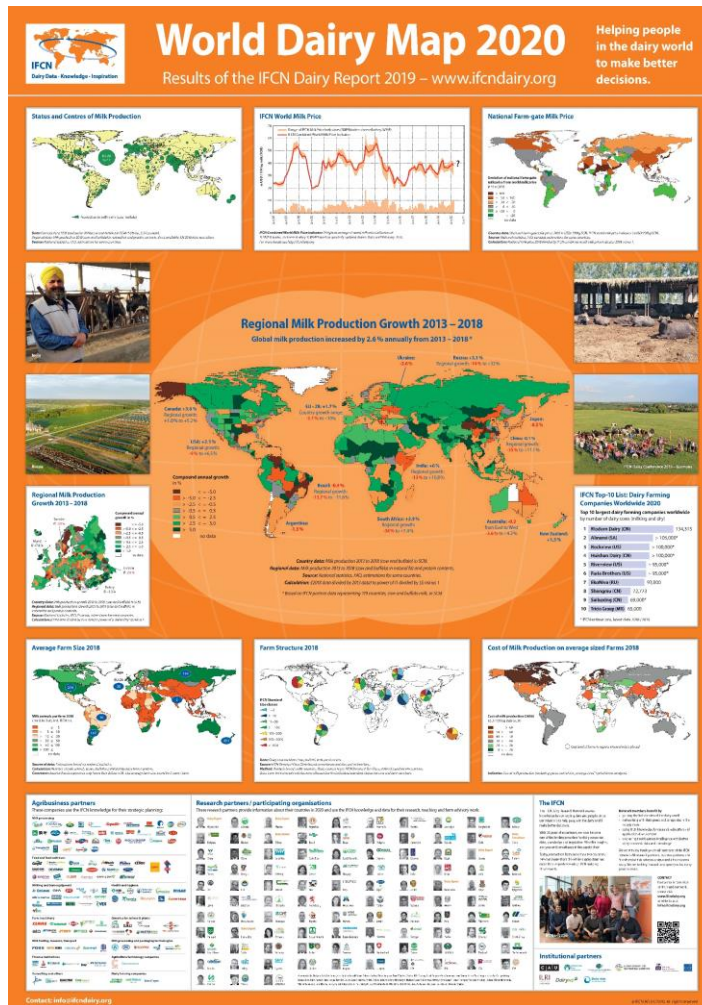
## Consulting And Others



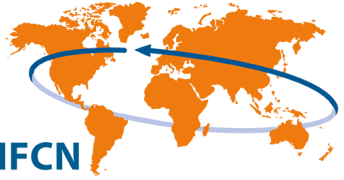
## Dairy Farming Companies



# World dairy map 2020 – become a global dairy expert in 2 minutes

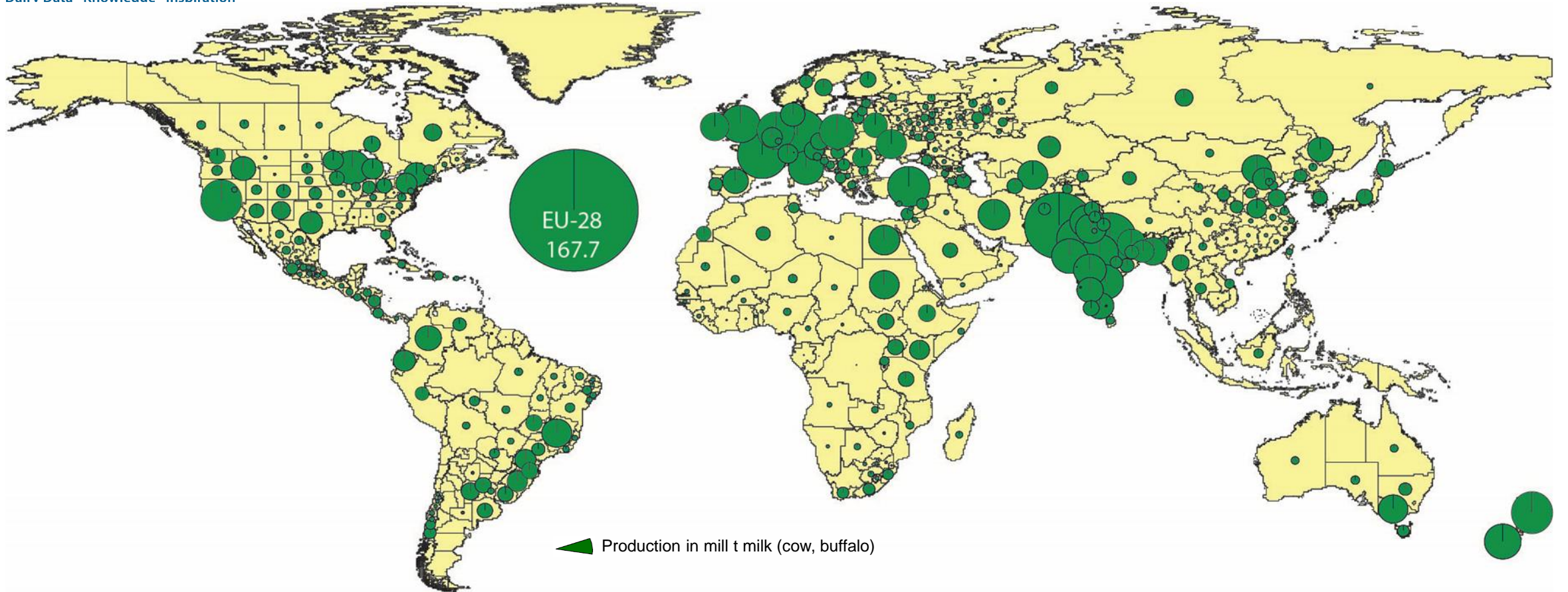


1. Milk production
2. Milk production developments
3. Average farm size
4. Dairy farm structure
5. Cost of milk production
6. Milk prices



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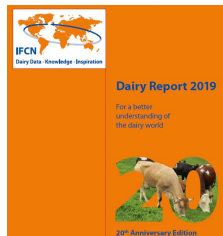
# Centres of Milk Production by dairy region



**Data:** Country data: Milk production 2018 (cow and buffalo) in SCM (4.0% fat, 3.3% protein).  
Regional data: Milk production 2018 (cow and buffalo) in natural fat and protein contents. If not available, CN 2016 data was taken.  
**Source:** National statistics, FAO, estimations for some countries.

For internal use only © IFCN 2019

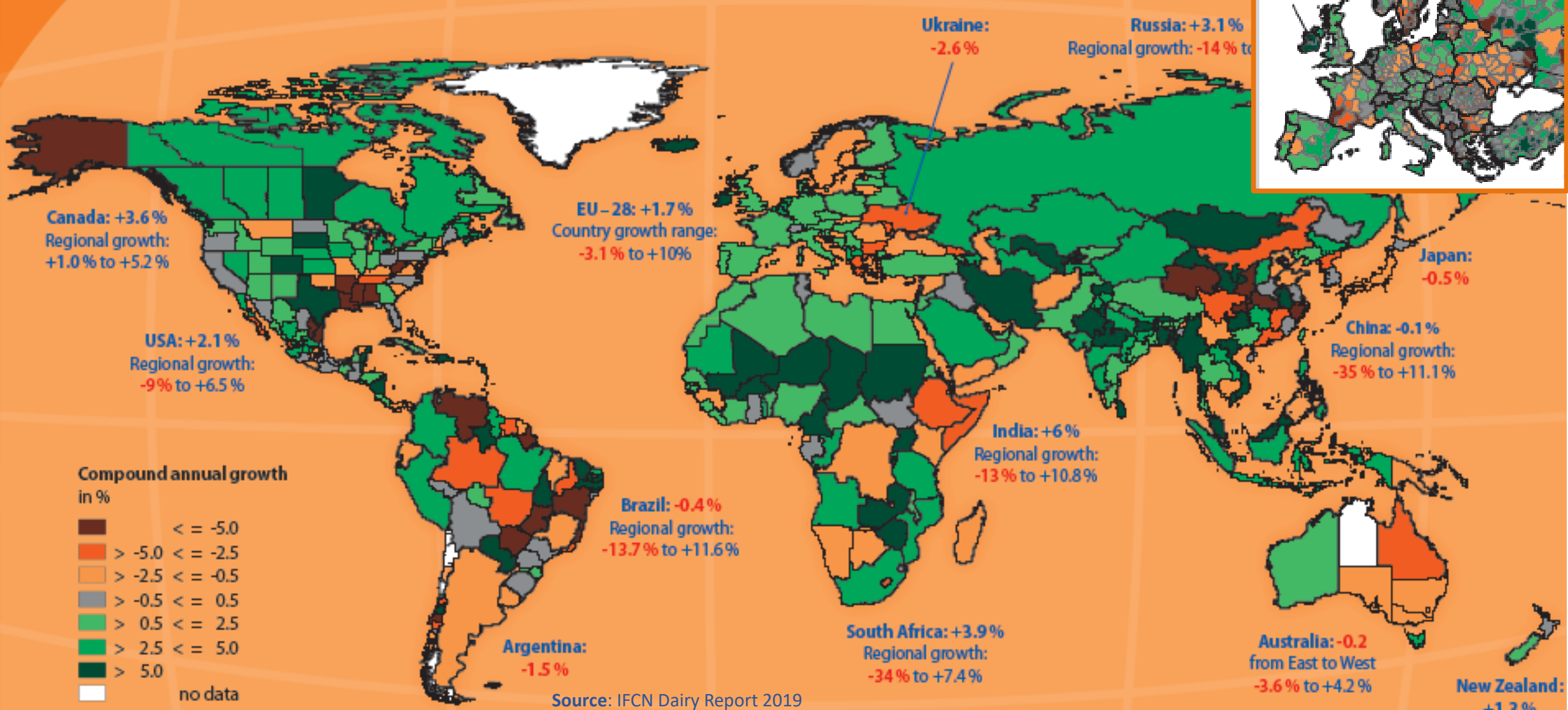
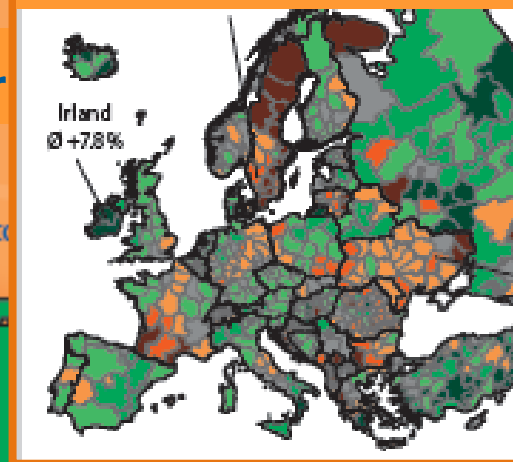
**Source:**  
IFCN Dairy  
Report 2019



# Regional Milk Production Growth 2013 – 2018

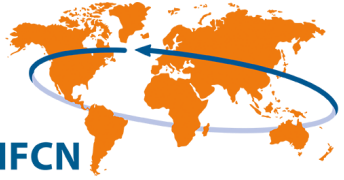
Key insight: Milk production is moving – speed up to +/- 5%/year

## Europe



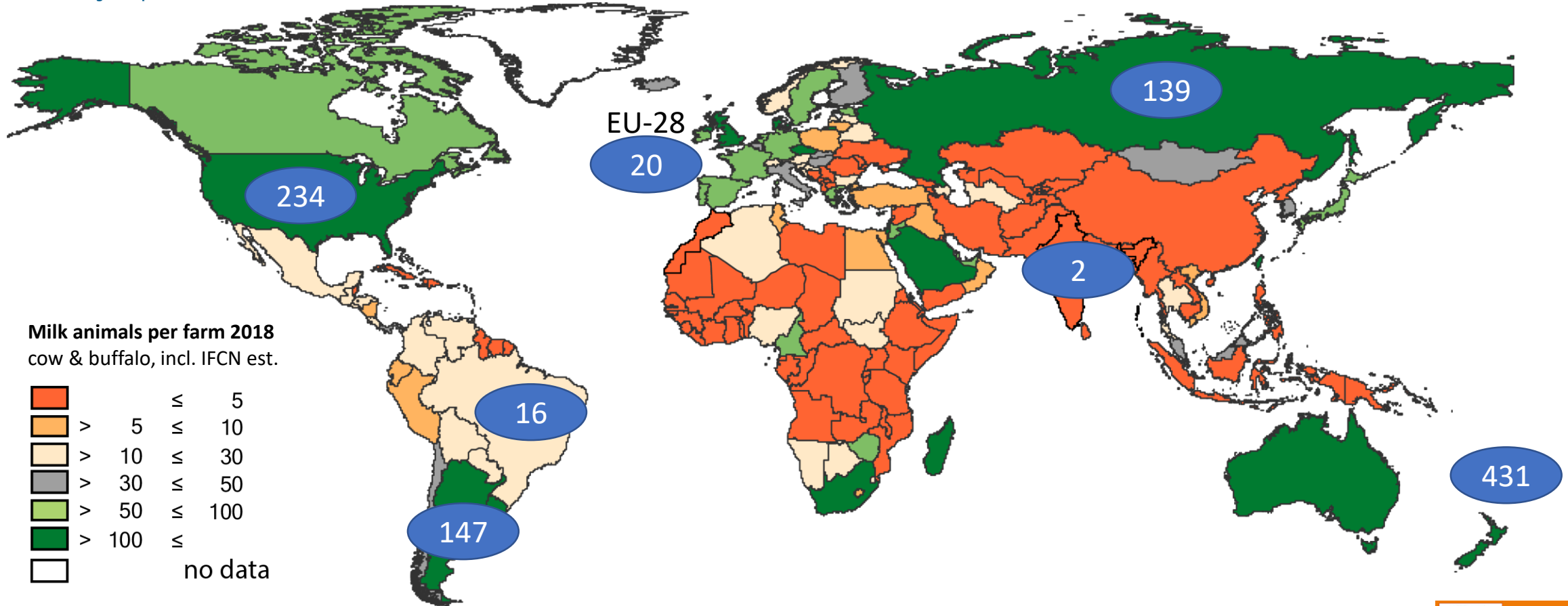
Source: IFCN Dairy Report 2019





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# Average Dairy Farm Size 2018

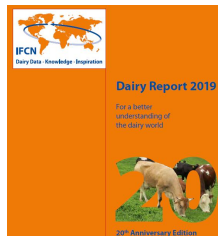


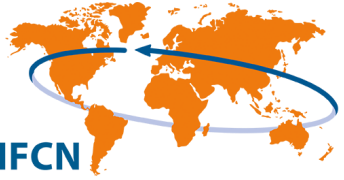
**Source of data:** Estimations based on national statistics

**Calculation:** Number of milk animals (cows, buffaloes) divided by dairy farm numbers

**Comment:** Data for Russia represents only farms that deliver milk. Else average farm size would be 2 cows / farm.

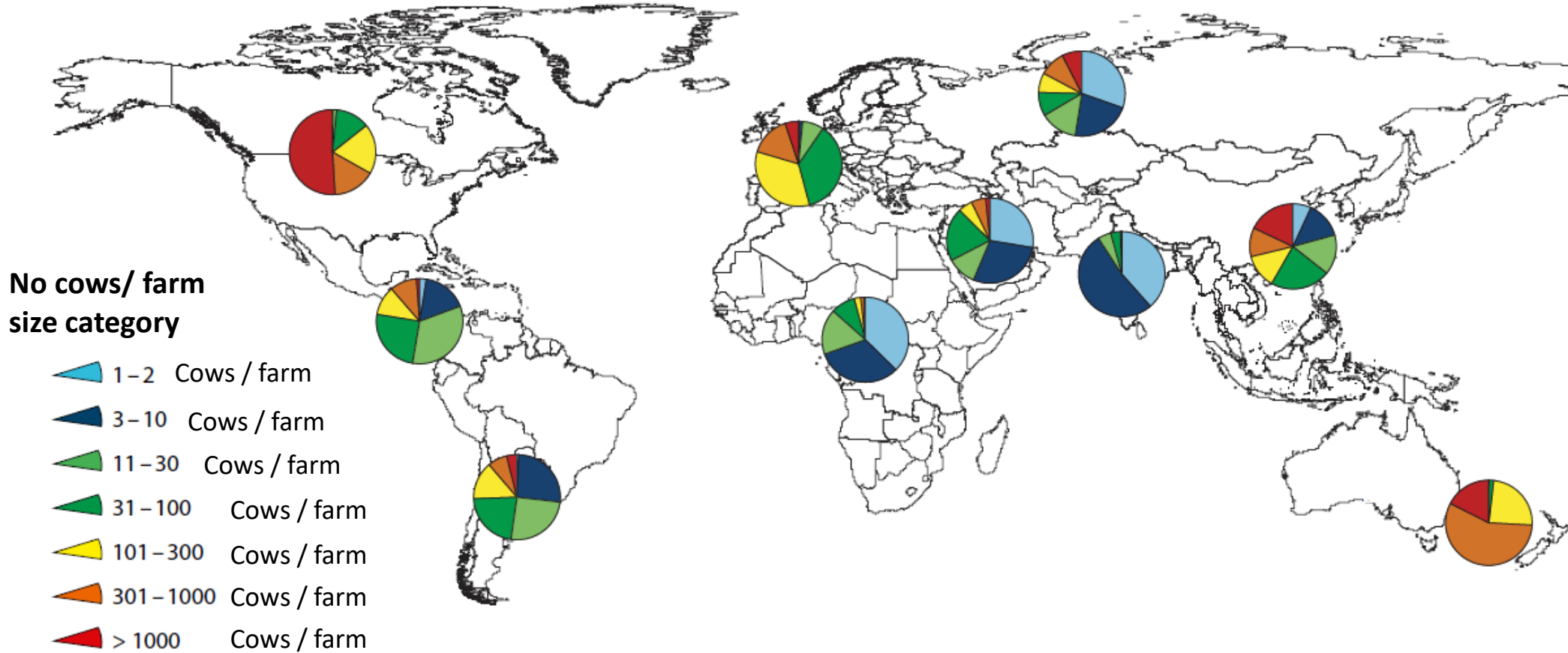
**Source:**  
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# Dairy Farm Structure by world region

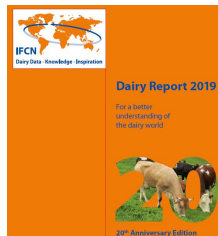


*Data: Dairy cow numbers (cow, buffalo) in % per size class.*

*Source: IFCN Standard Class Data based on national statistics and estimations.*

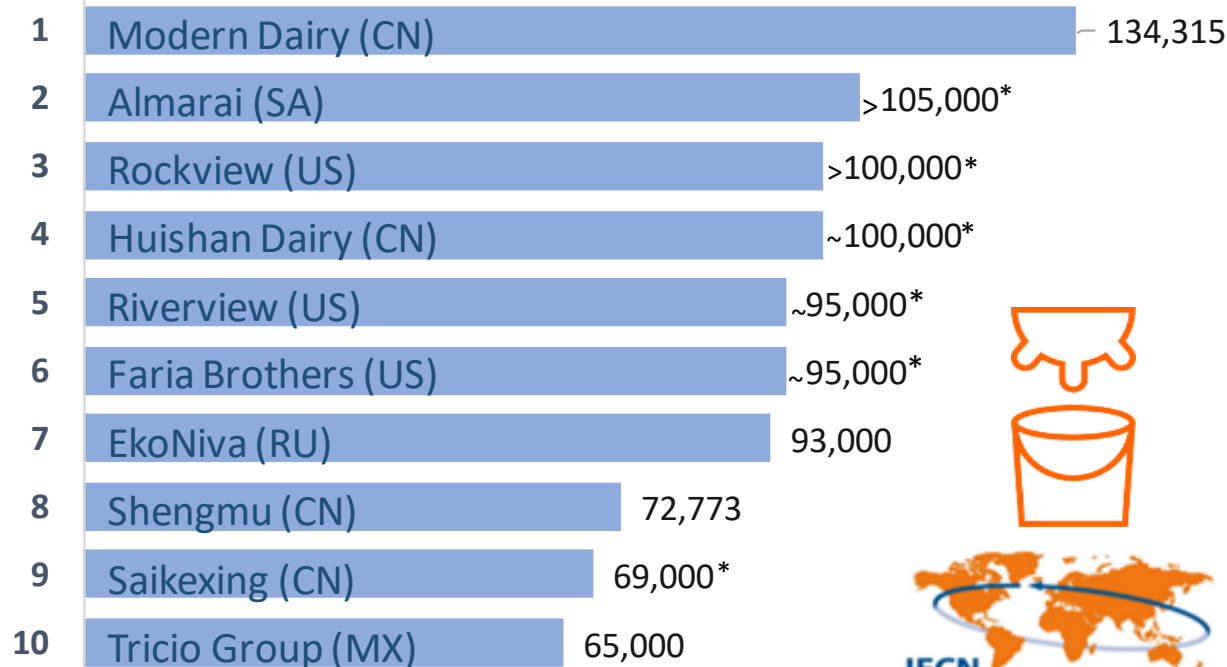
*Method: Analysis based on 86 countries. 7 IFCN Standard Classes, defined equal for all countries. Data from the national statistics were allocated to the individual standard classes*

Source:  
IFCN Dairy  
Report 2019



# IFCN Top-10 List: Dairy Farming Companies Worldwide 2020

## Top 10 largest dairy farming companies worldwide by number of dairy cows (milking and dry)



\*IFCN estimations, latest data 2018/2019

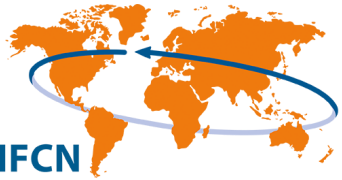


**Saudi Arabia and China** have the largest dairy farming enterprises in the world.

**The top 10 companies** together produced 1.1% of the world's milk output in 2018.

**The myth of large vs small dairy farms:** IFCN research of farming systems in over 50 countries shows that larger farms usually outperform smaller farms in various aspects of sustainability (environmental, social and economic). Source: IFCN Dairy Report 2019

**Method:** The research was conducted by IFCN. The data is based on annual reports, publicly available information and experts' estimations. IFCN welcomes any feedback to improve this analysis.

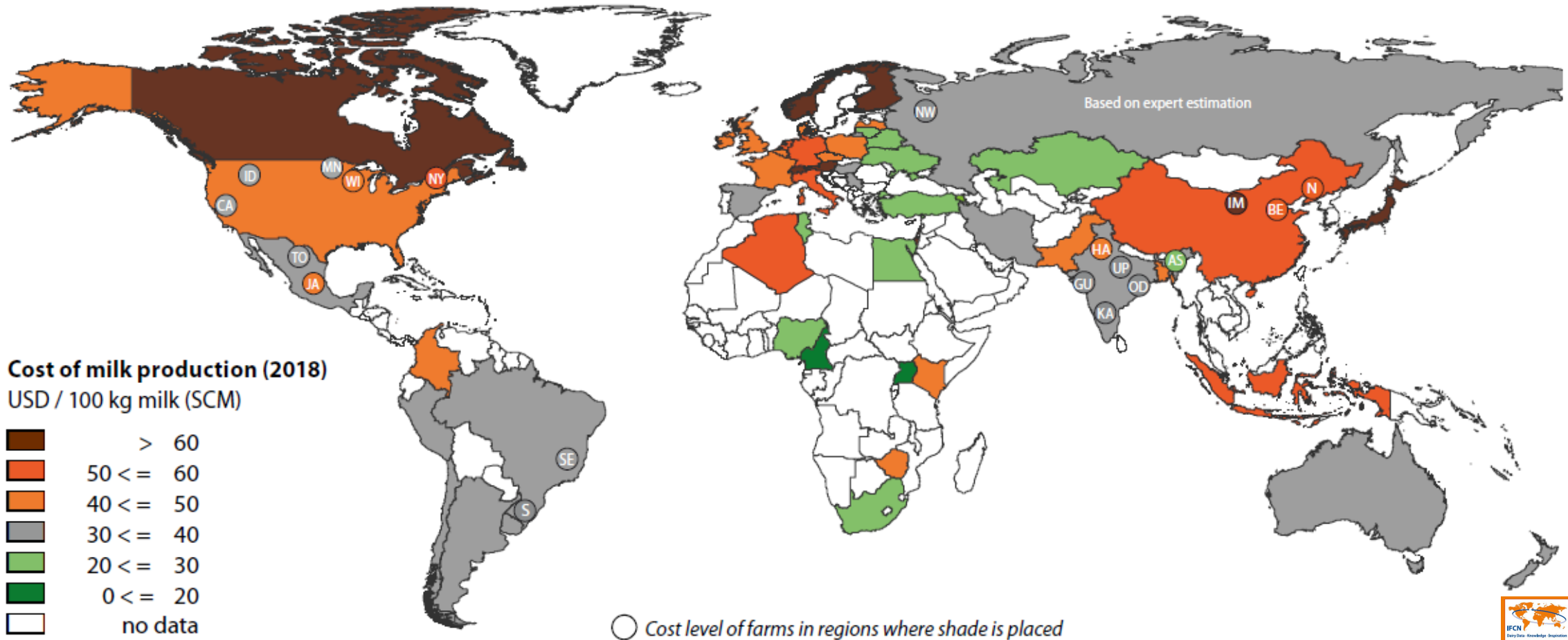


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# IFCN Cost of Milk Production Map 2018

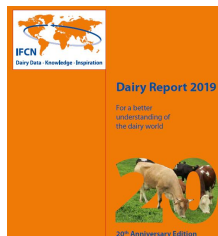
Based on method of typical farms and using the “average” farm types per country / region

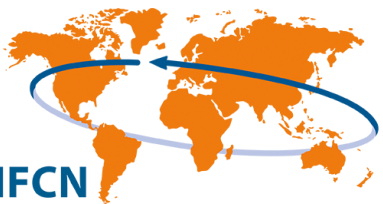


**Indicator:** Cost of milk production (excluding quota cost) of the „average sized“ typical farms analysed.

02/07/2020

Source:  
IFCN Dairy  
Report 2019

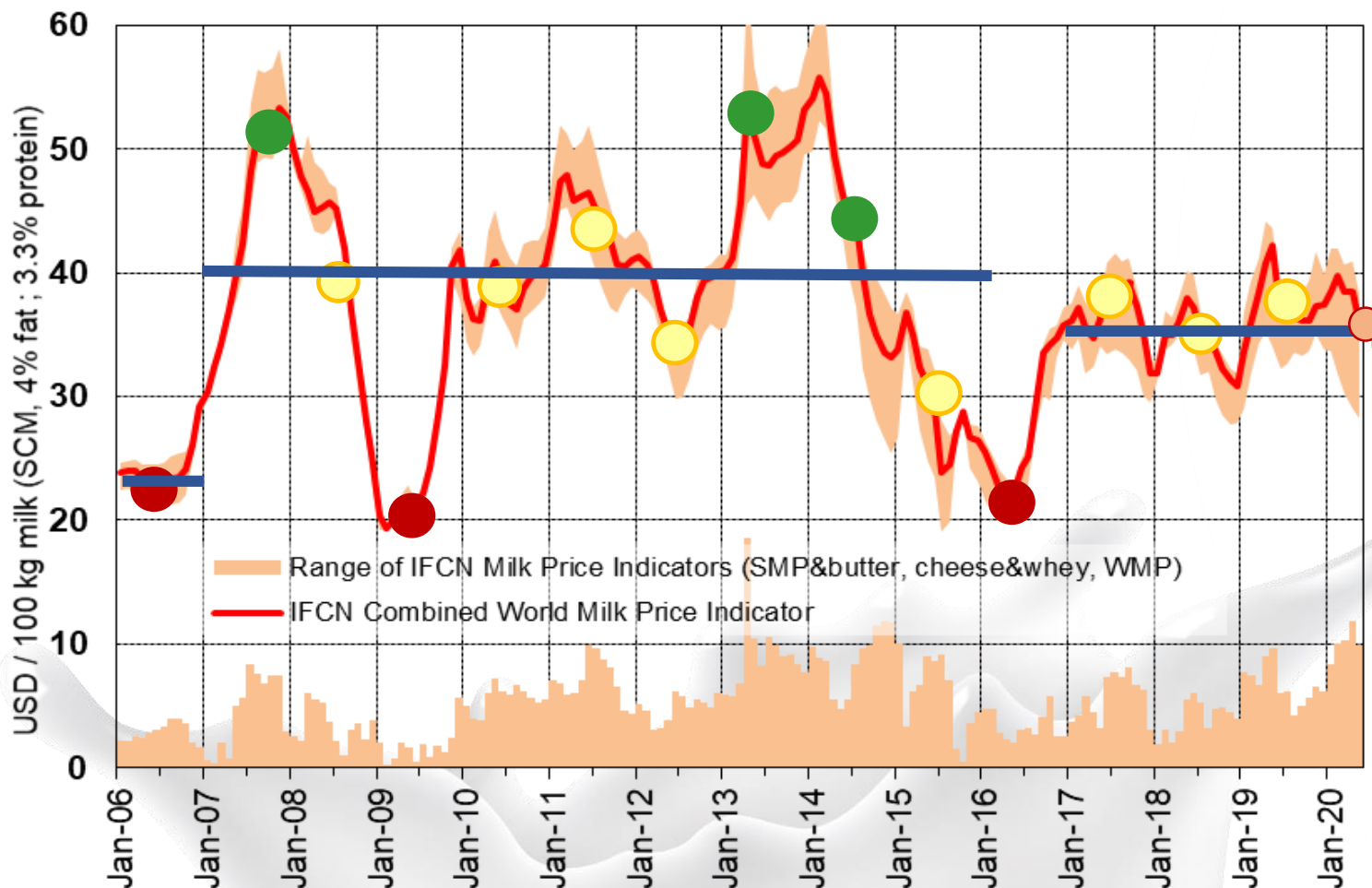




# IFCN World Milk Price

This indicator is based on the dairy commodities traded & converted to a “farm gate milk price level.

**\$/CWT** Dairy Data · Knowledge · Inspiration



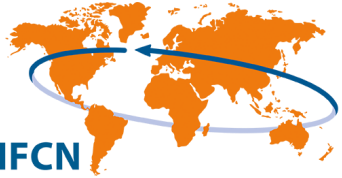
High

Moderate

Low

The dots represent IFCN Dairy Conferences

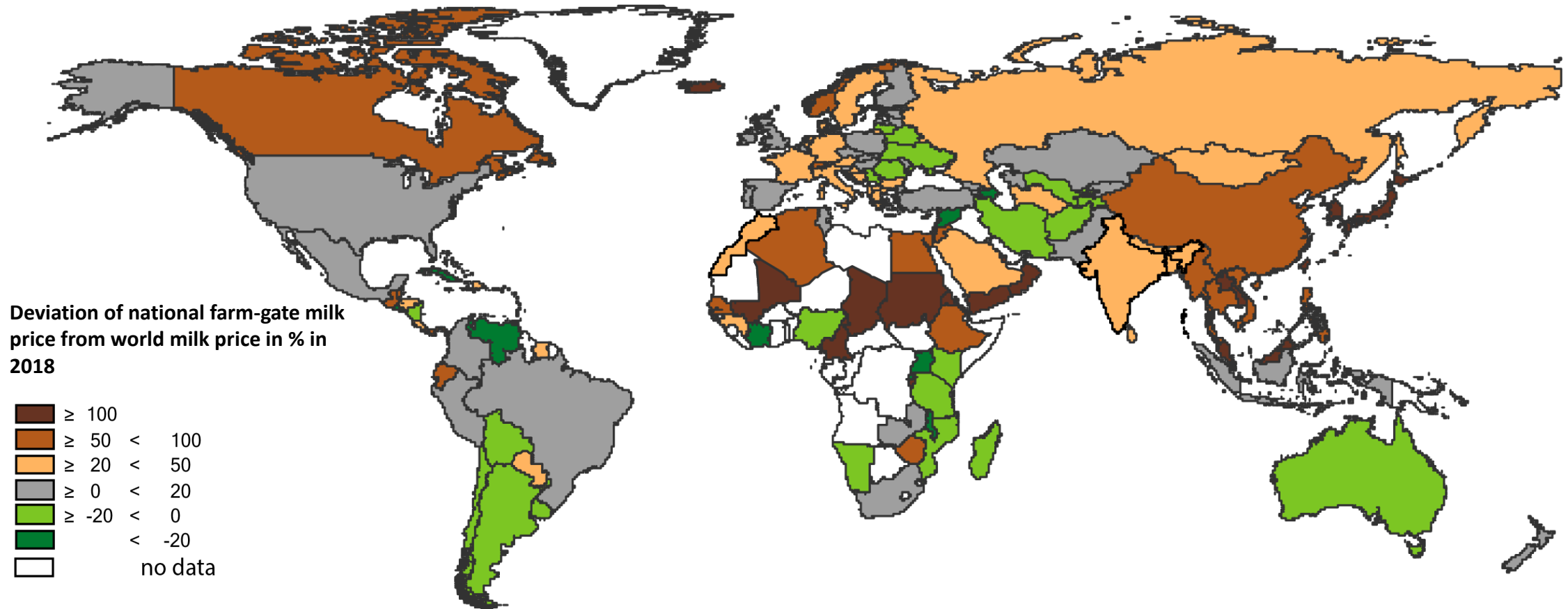
The last one was June 2-3, 2020



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# National Farm-gate Milk Price



**Country data:** National farm-gate milk prices 2018 in USD/ 100kg SCM, IFCN world milk price indicator in USD/100kg SCM

**Source:** National statistics, FAO, Eurostat, estimations for some countries.

**Calculation:** National milk price 2018 divided by IFCN combined world milk price indicator 2018 minus 1

Source:  
IFCN Dairy  
Report 2019

